DOCUMENT RESUME

ED 070 174 EA 004 716

AUTHOR	Farthing, Gene; And Others
TITLE	Merit Pay in Oregon. A Survey of Alternative Pay Plans.
INSTITUTION	Oregon School Study Council, Eugene.
REPORT NO	OSSC-Bull-Vol-16-No-3
PUB DATE	Nov 72
NOTE	33p.
AVAILABLE FROM	Oregon School Study Council, College of Education, University of Oregon, Eugene, Oregon 97403 ($2.50)
EDRS PRICE	MF-$0.65 HC-$3.29
DESCRIPTORS	*Incentive Systems; *Merit Pay; *Salary Differentials; *School Districts; State Surveys; Teacher Salaries
IDENTIFIERS	Oregon

ABSTRACT

This monograph reports on those districts (1) having alternative pay plans, (2) planning or studying alternative pay plans, and (3) having no alternative pay plans. No evaluation or interpretation of the data is provided. Appendixes contain (1) a list of the districts surveyed, (2) Redmond school district's 1972-73 salary schedule, and (3) the Klamath Falls differential pay proposal. (JF)

ED 070174

RESEARCH-DEVELOPMENT-SERVICE

OREGON SCHOOL STUDY COUNCIL

BULLETIN

EA 004 716

MERIT PAY IN OREGON

by

Gene Farthing
Herman Hughes
Glenn Dorn

Vol. 16, No. 3 November, 1972

OREGON SCHOOL STUDY COUNCIL
College of Education
University of Oregon, Eugene, Oregon

ED 070174

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
OFFICE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL OFFICE OF EDUCATION POSITION OR POLICY

MERIT PAY IN OREGON

A Survey of Alternative Pay Plans

by

Gene Farthing, Herman Hughes, and Glenn Dorn

Field Training and Service Bureau
College of Education
University of Oregon
Eugene, Oregon

Edited by Margaret Nielsen

Individual Copy Price - $2.50

FOREWORD

Is There Any "Merit" in Oregon?

The standardized single salary schedule for teachers was adopted in the 1930's and 40's by many school districts because of criticisms of the individual pay plans then in common use. More recently, in an attempt to enhance the instructional effectiveness of schools, to retain superior teachers, and to discourage inferior teachers, school boards increasingly have been taking a long look at alternatives to the single salary schedule.

Many school administrators and school boards in Oregon are asking about the merit and other pay alternatives, particularly those operating in their own state. They are raising such questions as:

--Who's talking in Oregon about merit pay?
--Which districts have used such plans?
--What are some other feasible alternatives?
--Who decides on eligible teachers? What are legitimate requirements for incentive pay?
--How do such programs operate?
--Why have some merit pay programs been dropped?
--What trends apparently exist?

In an attempt to answer these questions, the following Bulletin is published by the Oregon School Study Council in response to a survey request by the Oregon Education Association. This is a status report only, not an evaluation or interpretation. Information was gathered from 47 Oregon school districts which reportedly had adopted, or were considering, alternatives to the standard salary schedule for teachers.

Kenneth A. Erickson, Executive Secretary
Oregon School Study Council

TABLE OF CONTENTS

	Page
BACKGROUND	1
DISTRICTS HAVING ALTERNATIVE PAY PLANS (11)	2
1. Amity (Yamhill County)	3
2. Bethel (Lane County)	3
3. Colton (Clackamas County)	4
4. Coos Bay (Coos County)	4
5. Forest Grove (Washington County)	5
6. Gresham Elementary (Multnomah County)	6
7. Josephine County Unit	7
8. Medford (Jackson County)	7
9. Parkrose (Multnomah County)	8
10. Redmond (Deschutes County)	8
11. Warrenton (Clatsop County)	10
DISTRICTS PLANNING OR STUDYING ALTERNATIVE PAY PLANS (11)	11
1. Elkton (Douglas County)	11
2. Gresham Union High (Multnomah County)	12
3. Hillsboro Elementary (Washington County)	12
4,5. Klamath Falls (2) (Klamath County)	13
6. Lake Oswego (Clackamas County)	16
7. Lincoln County Unit	16
8. North Clackamas (Clackamas County)	16
9. Oregon City (Clackamas County)	17
10. Reynolds (Multnomah County)	17
11. Springfield (Lane County)	17
DISTRICTS SURVEYED HAVING NO ALTERNATIVE PAY PLANS (25)	18
1. Astoria (Clatsop County)	18
2. Bandon (Coos County)	18
3. Burns (Harney County)	18
4. Corvallis (Benton County)	19
5. Crow-Applegate (Lane County)	19
6. David Douglas (Multnomah County)	19

TABLE OF CONTENTS (cont.)

		Page
7.	Estacada (Clackamas County)	19
8.	Glendale (Douglas County)	20
9.	Gold Beach Union High (Curry County)	20
10.	Harrisburg (Linn County)	20
11.	Marcola (Lane County)	20
12.	McMinnville (Yamhill County)	20
13.	Oakland (Douglas County)	21
14.	Pleasant Hill (Lane County)	21
15.	Port Orford-Langlois (Curry County)	21
16.	Rainier (Columbia County)	21
17.	Redland (Clackamas County)	21
18.	Reedville (Washington County)	21
19.	Roseburg (Douglas County)	22
20.	Salem (Marion County)	22
21.	Sheridan (Yamhill County)	22
22.	Sherman Union High (Sherman County)	22
23.	Silverton (Marion County)	22
24.	Vernonia (Columbia County)	22
25.	West Linn (Clackamas County)	23
APPENDIX 1 -	Districts Surveyed	24
2 -	1972-73 Salary Schedule, Redmond School District	25
3 -	Differential Pay Proposal, Klamath Falls	26
4 -	Proposed Criteria for Differentiation, Klamath Falls	27
5 -	Proposed Transition Plan, Klamath Falls	28

MERIT PAY IN OREGON

A Survey of Alternative Pay Plans

BACKGROUND

The entire concept of merit pay for teachers--sometimes called "incentive pay" or "career pay"--is regarded with great diversity in educational circles, ranging from a definitely negative assessment of the plan as "highly objectionable" to a most positive assessment of its being "highly desirable and conducive to improvement of instructional practices." Not only is there great range of opinion as to the relative value of merit pay, but also as to the basic definition of the term itself. One definition commonly used is that given by Hazel Davis, formerly director of the National Education Association Research Division:

> . . . a recorded judgment about a teacher which determines, at least in part, the amount of his salary and may affect the rate of salary progress or ultimate maximum.

Cecil J. Hannan, Associate Executive Secretary of the NEA, who co-authored a handbook on merit pay, defines the term as "salary based to any degree on rating or evaluation."

Prior to the advent of the single salary schedule, most teachers were paid on a merit basis. During the 1930's and 40's, however, implementation of a standardized salary schedule became the generally accepted practice across the nation, and the use of merit pay rapidly declined. Statistics from the NEA Research Division show that the incidence of merit pay in school districts of 30,000, or more, dropped from 20 percent in 1938 to

4 percent in 1958 and that by 1963 only 5 percent of 2,500 large school systems were using a merit pay plan. More recent NEA research indicates no increase in merit provisions nationally.

In order to examine the extent to which alternatives to a standardized salary schedule are currently being used in the state of Oregon, the Oregon Education Association commissioned the Field Training and Service Bureau in the College of Education to survey the state's school districts which reportedly utilized or were considering such alternative plans. The intent of the survey is not to evaluate the current practices or to interpret trends.* The sole purpose of the report is to provide a cross-sectional picture of Oregon school districts which are currently using, or have considered using, alternative pay plans.

Forty-seven school districts were included in the survey (see Appendix 1). Of these districts, 11 were currently found to have alternative pay plans, 11 were found to be planning/studying alternative plans, and the remaining 25 were found to have no current alternative plans nor to be considering such.

DISTRICTS HAVING ALTERNATIVE PAY PLANS (11)

The following information was gathered from the eleven districts which indicated that they have some form of merit or incentive pay--Amity, Bethel, Colton, Coos Bay, Forest Grove, Gresham Elementary, Josephine County,

---

*The substantive results of this survey were presented to the Professional Negotiation Seminar held at Portland State University on September 30, 1972.

Medford, Parkrose, Redmond, Warrenton:

1. Amity (Yamhill County)

For the 1972-73 school year the Amity District has budgeted $500 for incentive pay to teachers recommended by principals and the superintendent. This year three teachers have been recommended to each receive $100 or $200 as incentive pay. This procedure probably will continue for another budget year.

2. Bethel (Lane County)

A Career Recognition Pay Plan (CRPP) is available by application for Bethel District teachers who have been at the top of the range in Columns C or D of the district's salary schedule for at least one year. Currently, there are two CRPP steps possible for qualified teachers in Columns C and D of the schedule.

Applications must be submitted in duplicate to the school principal by March 13. Each principal, then, must submit one copy to the assistant superintendent by March 14. He, in turn, must bring all applications submitted to him before a review committee no later than March 28.

The review committee consists of the district administrator directly responsible for the applicant's supervision or his designated representative, the director of elementary education or his designated representative, the assistant superintendent of schools or his designated representative, and the superintendent of schools. The review committee is called into session by the assistant superintendent. Notice is given to the applicant by the superintendent not later than March 31 as to approval or disapproval of the application.

The present program, which has been operating for five or six years, was arrived at as a result of the consultation process and appears to be effective enough to be continued for at least another year. The district spent three years examining the feasibility of a more comprehensive merit program which has subsequently been indefinitely postponed.

3. Colton (Clackamas County)

The Colton School District is currently implementing both a merit pay program and an incentive pay plan. The district's salary schedule consists of a single column which this school year, 1972-73, ranges from the beginning step of $7,301 to the maximum figure of $11,830 at the fifteenth step. Each year the schedule has been changed by adding an agreed-upon, cost-of-living increase.

Teachers at experience levels 3, 6, 9, 12, and 15 are eligible to receive incentive pay provided they have completed eight hours of credit during the preceding period. This amounts to $400 at the third step and increases $80 for each succeeding step until it reaches $640 at the fifteenth step.

Teachers may receive merit pay up to $200 per year during years when they are not eligible for incentive pay. A composite evaluation based on a teacher's self-evaluation and the principal's evaluation is used to determine whether or not this merit pay is to be granted.

4. Coos Bay (Coos County)

The Coos Bay School District has a non-accumulative merit pay program based upon the teacher's evaluation in the previous year. The program was developed by a committee consisting of two board members, two

administrators, eight teachers, and one central office staff member. The consultant to this committee was from the Oregon State University faculty.

Although the plan may be changed by negotiations each year, its essentials are as follows:

I. One step merit--one additional step on salary schedule

*II. Two step merit--one step plus 5 percent of salary base

*III. Three step merit--one step plus 7 percent of salary base

There is no requirement that the teacher must have taught in the district a certain number of years.

The first evaluation period in November gives some idea of how many and who might be eligible; the final evaluation in March determines the merit finalists. The principal is the evaluator in the elementary schools and the department heads are evaluators in the high schools. A teacher may belong to an evaluation team if he goes to a special class (paid evaluator). A teacher may make a request for a team evaluation, and about three percent normally request such an evaluation.

5. Forest Grove (Washington County)

Forest Grove has a merit plan which is essentially available for those at the top of the schedule--M.A., M.A. + 45, and B.A. + 75. This program, initiated by the school superintendent, is in its first year of operation. The merit committee consists of five teachers and five board members. The superintendent sits in on the conference.

---

*Salary base this year (1972-73) is $7,138, based on a point system.

A sum of $500 is available for those teachers in the top rating bracket, based on the principal's evaluation and recommendation. The state evaluation form and one from their own district are used. Another form by the principal states why he proposed the merit pay.

The district believes this is a very positive program, the only weakness being in the comparative skills of the evaluator. An optional form of evaluation by another teacher can be requested by the applicant.

The district's plans for next year are indefinite at this time. Until a handbook on consultation becomes available at a later date, written policy concerning such matters remains rather vague.

6. Gresham Elementary (Multnomah County)

The Gresham Grade School District No. 4 is on a year-round school schedule. Teachers' salaries are determined from a single salary schedule and are based on the number of days for which a teacher is contracted. A basic salary as indicated on the salary schedule is figured on 185 contract days. Teachers working more or less than 185 days have their salary prorated on their basic schedule salary.

Currently, about 25 percent of the faculty are on extended contracts. These include counselors, music teachers, physical education teachers, librarians, speech teachers, and a number of "team" teachers in grades 4-8. The remaining 75 percent are "tracking" teachers who teach 45 days followed by a 15-day vacation.

According to district officials, the board is interested in continuing a study of possible career recognition salary plans. However, it feels that

the current year-round extended contracts tend to be satisfying a need for some merit provision.

7. Josephine County Unit

Josephine County Unit has a pilot program which has been in effect for two years at their Manzanita Elementary School. It is entitled, Individualizing Instruction Through Differentiated Staffing.

In implementing this pilot program, the district has selected six teachers who are designated as instructional leaders on Performance Contracts. Their job descriptions have been written in behavioral terms. The following quotation from the job description is of interest:

1. Evaluation of the foregoing objectives will be made by the principal and/or consultant. When possible, an outside audit team will be utilized.

2. Failure to accomplish three or more of the objectives by the times specified in the event network may be cause for termination of employment at the end of the current school year.

To date, this program is in effect only with the six instructional leaders at the Manzanita Elementary School.

8. Medford (Jackson County)

The Medford School District had a Merit Pay Program from the 1959-60 school year to 1970-71, but it is now being phased out. The plan provided for a four-step annual increment of $250 whereby a first-year merit teacher received $250, a second-year merit teacher received $500, a third-year merit teacher received $750, and a fourth-year merit teacher received $1,000.

Although the plan was subjected to considerable discussion and criticism by school board members, it remained in effect for twelve years--through

the 1970-71 school year. Opposition to the plan was based upon four considerations:

1. Lack of preciseness was noted in evaluating teacher performance.
2. Merit teachers rarely received poor evaluations.
3. Too many teachers were being placed on merit.
4. The program was too costly.

As a result of the consultation process, the school board, in 1970-71, arrived at an agreement with the Medford Education Association that called for phasing out the Merit Pay Program over a four-year period. This phasing out process was started during the 1971-72 school year and is now in the second year. By the 1974-75 school year, the Merit Pay Program will be completely phased out.

9. Parkrose (Multnomah County)

Parkrose has a Career Recognition Program that is now undergoing revision. The plan has been in effect for some years, but has been adversely affected by recent negotiations. At present, teachers are evaluated for career recognition by the principal and assistant superintendent. An appeal board is provided consisting of representatives from each building in the district.

10. Redmond (Deschutes County)

As a result of the consultation process, the Redmond Education Association and the Redmond Board of Education entered into a three-year Consultation Agreement on January 27, 1971. The basic agreement covers the period from July 1, 1971, through June 30, 1974.

While a salary schedule is a part of the agreement, in concept it differs from the traditional salary schedule in that it has no experience columns identified as such (see Appendix 2). Advancement on the salary schedule is determined by work performance each year until the teacher reaches the maximum within his level. No further pay increase is possible until the teacher is advanced to another level.

The school board may advance a teacher to a higher level on the schedule upon the recommendation of the superintendent or the District Evaluation Committee. Advancement to a higher level depends upon two factors:

1. Evaluation of the teacher's past work performance.
2. The scope of the particular teacher's responsibility.

Teachers on levels 1-5 receive 185-day contracts. Those on level 6 receive 205-day contracts, while those on levels 7-9 receive 220-day contracts. "[Contracted] time beyond the regular school year will be used toward the improving of the general level of instruction in the district."

The District Evaluation Committee is composed of five teachers selected in an impartial manner from two lists, each containing the names of 50 percent of the district's teachers plus five, listed in order of preference. One list is submitted by the superintendent and one by a committee of three teachers elected by all teachers. The first five teachers to appear on both lists in order of preference compose the District Evaluation Committee. Members of the committee are provided with up to 20-days' time free of teaching responsibilities. Secretarial time also is provided for the committee.

The District Evaluation Committee is empowered to evaluate any teacher in the district. The members of the committee recommend level and step

changes to the superintendent, who must then inform the committee of the administrative personnel recommendations to be made to the Board of Education at least one week before the salary recommendations are presented to the board. The District Evaluation Committee may accept or reject the superintendent's recommendation. In the latter instance, the committee and the superintendent make separate presentations of their recommendations to the board.

Should any teacher not advance to a higher salary position, he may appeal to the Hearing Advancement Board if he feels that such advancement is justified in light of the two evaluative criteria. The hearing board consists of three persons: one member appointed by the Redmond Education Association, a second member appointed by the board, and a third person (to serve as chairman) appointed by the first two appointed members. This hearing board considers all written grievances presented to it prior to March 1 in any year and then prepares a written recommendation to the Board of Education stating whether or not the teacher should be advanced to a higher level. Since only the Board of Education can make the final decision regarding such matters, the Hearing Advancement Board acts only in an advisory capacity.

11. Warrenton (Clatsop County)

The superintendent of the Warrenton District proposed to the board that it budget $1,000 this year as incentive pay for teachers, stipulating that an average of $200 be awarded to an applicant who goes beyond his normal job requirements. (Example: A project, such as Outdoor Education, is approved by the administration. When it is completed, it is reviewed

by the board and, if merited, the award is granted.) Usually, four or five teachers are expected to apply each year.

DISTRICTS PLANNING OR STUDYING ALTERNATIVE PAY PLANS (11)

The 11 districts which were found to be currently planning or studying the use of alternative pay plans were Elkton, Gresham Union High, Hillsboro Elementary, Klamath Falls (2), Lake Oswego, Lincoln County, North Clackamas, Oregon City, Reynolds, and Springfield. These districts submitted the following information:

1. Elkton (Douglas County)

The Elkton school board dropped the single salary schedule during the 1971-72 school year. They adopted in its place a Teachers' Salary Guide which stated that "The board reserves the right to establish teachers' salaries in a fair and equitable manner with due regard to present salary, training, years of service and performance of assigned duties." For 1971-72, teachers were paid their 1970-71 salary plus six percent with certain exceptions listed in the Teachers' Salary Guide.

The 1972-73 Teachers' Salary Guide indicates a return to a salary schedule as a result of consultation between the board and the teachers. Condition C on the 1972-73 Teachers' Salary Guide states:

> The teachers, with the board and the administration, shall form a study committee which shall recommend to the teachers and the board some merit criteria for advancement of teachers on the salary schedule, said merit criteria to become effective for the 1973-74 school year.

2. Gresham Union High (Multnomah County)

During the fall of 1971, the Board of Directors of the Gresham Union High School District, as the result of a teachers' proposal presented to the board during the consultation process, appointed a Merit Pay Committee. The committee consisted of:

Three administrators (one from each of the district's three high schools)

Six teachers (two from each of the district's three high schools)

Six citizens (two from each of the district's three high school attendance areas)

One school board member

The committee was directed by the board " . . . to make a study of merit pay systems and to make recommendations to the board on a merit pay system for this school district." Specific areas of concern which the board asked the committee to study included:

1. Definition of merit pay.
2. Establishment of goals and objectives.
3. Analysis of the present teacher evaluation program for teachers.
4. Review of existing plans or systems of merit pay that are now operating.
5. Development of a plan or system for compensating teachers on the basis of performance.

The board established November 7, 1972, as the date for presentation of the final report and recommendations.

3. Hillsboro Elementary (Washington County)

In the 1971-72 negotiations between the board and the Professional Economics Committee, it was agreed that a committee should be formed to

study a merit pay program. The committee was not active at the time of the survey in September, 1972. There seemed to be some question as to how much progress would be forthcoming.

4, 5. Klamath Falls (2) (Klamath County)

On September 18, 1972, the Merit Pay Feasibility Committee presented a formal report entitled Feasibility of Merit Pay to a joint meeting of the boards of directors of the Klamath Falls Elementary School District No. 1 and the Klamath Falls Union High School District No. 2.

The committee, authorized by both school boards, was appointed by the superintendent in April of 1972. It consisted of:

Two board members (one from each district)

Two budget review committee members (one from each district)

Two principals (one elementary, one secondary)

Three teachers (one elementary, one junior high, and one high school)

Two citizens/parents

One director of curriculum for both districts (serving as chairman)

The following quotations from the final report represent the committee's recommendations:

1. The first and most crucial step is the outlining and development of a long-range plan, including a multi-year salary agreement as the basis for the study, development, and implementation of alternate plans.

2. It is recommended that the boards NOT adopt the traditional type of "merit" pay plan in which merit increases are tied exclusively to the judgment of one evaluator.

3. It is recommended that every effort be made to move away from the traditional salary schedule (with merit defined strictly in terms of professional preparation and time in service) as the method of distributing funds, and toward alternative plans.

4. The committee recommends that every effort be made to remove the issues involved in plans that would replace the salary schedule from the (political) polarized part of negotiations, and to place these issues in the study, planning, and educational part of the school program.

5. We urge the formation of an ACTION committee to continue the studying and planning that has barely been begun by the present committee.

6. It is recommended that the development of transitional plans and steps be clearly outlined after considerable teacher and community involvement. (Two complementary and transitional plans are outlined in the attachments.)

7. The committee would encourage the baords to consider pilot programs dealing directly with staff utilization and varied roles for teachers.

8. Beyond the pilot program approach, the boards are encouraged to consider what is now being called alternative learning environments--a school within a school, or just a novel or unique program involving three to six or more teachers funded by district funds but not an integral part of the school.

9. . . . we strongly urge the boards to include funds in the regular budget for travel, outside consultants, inservice programs for staff, and public relations. This is to recognize the need for considerable involvement of staff and community.

10. Since the committee feels that a breakthrough in evaluation of performance is crucial to overcome the central dilemma of feasibility of alternate staffing patterns and differential pay plans as a means of adding some aspects of teacher performance and/or effectiveness to time in service and professional prepration, it is recommended that the KFEA and teachers in general be challenged to develop an evaluation system--including objectives, instruments, procedures, etc.--that would be workable as pay differentiation criteria . . . (in simplest form, procedures that would distinguish three levels of performance as per the criteria attached.)

11. Our final recommendation is that dissemination of the committee's study be made by the boards as a direct means of involving teachers, administrators, and the public in a continuing dialogue aimed at meeting the challenges of alternate plans by using the outlines of this study as a beginning for more ambitious study and planning as a joint venture--boards, teachers, administrators, and the community of Klamath Falls.

The committee's report also included, for discussion purposes only, the following materials labeled as samples:

1. A Differential Pay Plan which includes figures for the period 1962-72 that tend to support the argument in favor of a 5.5 percent annual base increase for a multi-year agreement (see Appendix 3).
2. The Criteria for Differentiation which illustrates a sample evaluative point system whereby teachers may accumulate up to 107 points which can be translated to dollars in computing the teacher's salary increase for the subsequent year (see Appendix 4).
3. A Transition Plan which indicates how teachers would be categorized and how the plan would be phased into full implementation over a five-year period (see Appendix 5).

The following time sequence was presented to the board for discussion and consideration:

> 1972-73--Negotiate a three-year salary agreement as PART of a long-range program for alternative plans . . . OR negotiate for one year with the agreement that work will continue throughout the year toward a multi-year salary agreement as PART of the long-range plan. The multi-year outline could be as follows:
>
> First year--Study, plan, visit, and involve
> Second year--Transitional plan as per samples
> Third year--Revise and refine criteria plan
> Fourth year--Evaluate long-range plan, the transitional plan that was implemented, and the multi-year salary agreement as a basis for continuing, changing directions, etc.

6. Lake Oswego (Clackamas County)

In Lake Oswego, a competency-based salary schedule is being developed based on the performance of the individual. An 11-member study committee, which began meeting last spring, includes representatives of the teachers and administrators, as well as four consultants from industry.

Lake Oswego does have a small differentiated staff program of twenty department chairmen in high schools and seven in elementary schools also involved in evaluation. The negotiations committee last year set up $165,000 for extensive extended contracts. A total of 120 of 300 teachers are involved in some extra-professional activities. Selection for these activities is done by principal evaluation. The assistant superintendent for personnel manages the program.

7. Lincoln County Unit

Lincoln County is in the final phase of developing an incentive plan. The proposed plan, based upon teacher competency, will stress value of experience, staff development, and extra-curricular activities. The incentive plan study was initiated three years ago by a consultation group made up of administrators, teachers, board members, and consultants. This past year it also included members of the community.

8. North Clackamas (Clackamas County)

The school board has adopted a salary schedule that would permit the district to adopt a merit pay plan. However, an agreement was reached with the teachers to withhold any such plan for the current year. In the meanwhile, discussion and planning steps will continue. (Note: The

Milwaukie Union High School District which formerly had a merit pay plan is now a part of the newly formed North Clackamas School District.)

9. Oregon City (Clackamas County)

The Oregon City School District, as a result of the consultation process, currently has a Performance-Related Pay Committee organized for the following major objective:

> [The] development of a procedure and related form for evaluating the job performance of certificated staff members in such a manner that their compensation may be based upon the evaluation obtained.

Membership in the committee consists of:

One Budget Committee member, selected by the board.

Three administrators, one elementary and one secondary principal, selected by their peers, and the superintendent (ex officio).

Eight teachers, two selected by their peers from each of the following grade groupings, K-3, 4-6, 7-9, and 10-12.

Three students, one from each secondary school selected by the student government.

The committee held its first meeting during April, 1972. The final report is to be presented to the school board no later than November, 1972.

10. Reynolds (Multnomah County)

At the present time, the matter of merit or alternative pay in the Reynolds School District is in the discussion stage, and the board has nothing to report.

11. Springfield (Lane County)

At the direction of the school board, the Springfield School District formed a Merit Pay Study Committee last year. The committee made up of

administrators, board members, and members of the local education association, met, reviewed several pay plans, set objectives, and reported to the school board in May. By the deadline for this study, there were no definite plans for future action.

DISTRICTS SURVEYED HAVING NO ALTERNATIVE PAY PLANS (25)

The remaining 25 districts surveyed were initially thought to have some form of alternative pay plan, but each one indicated that it had no such program today. The following comments summarize the response from each district:

1. Astoria (Clatsop County)

During the 1971-72 school year, a committee composed of representatives from teachers, the school board, and the administration in the Astoria School District spent three months studying a merit pay plan. The committee concluded that such a plan was not practicable at that time, and the subject was shelved. At the present time, there are no plans to reactivate the study.

2. Bandon (Coos County)

Bandon has no merit plan at this time and nothing is being planned. Their current schedule provides extra pay for extra duties and makes provisions for B.A. + 60, B.A. + 75, and Master's Degree.

3. Burns (Harney County)

The Burns School District No. 1 implemented a merit pay plan for two years, 1969-70 and 1970-71. As a result of the consultation process, the

plan was discontinued at the end of the 1970-71 school year. There are no current plans to reconsider alternatives to the single salary schedule.

4. Corvallis (Benton County)

Corvallis does not have an alternative plan to the single salary schedule at the present time, and the district has nothing in the planning stage. The only practice in Corvallis that might be different from other districts is that yearly increments are not automatic. Teachers are recommended or not recommended for advancement on the salary schedule by the local principal and the superintendent, and actual advancement on the salary schedule is by school board action.

5. Crow-Applegate (Lane County)

The Crow-Applegate School District does not have an alternative plan to the single salary schedule. It does offer extended contracts to selected teachers for summer work in curriculum and program planning.

6. David Douglas (Multnomah County)

The school board reportedly favors some type of merit pay program, but teachers apparently are opposed to such a plan. (The district does not have the standard "extra pay for extra duties.") Recipients of extended contracts are selected by the superintendent's office. Salary columns include B.A. + 75, M.A. + 23, and M.A. + 45.

7. Estacada (Clackamas County)

Estacada does not have a merit or incentive pay plan at this time and does not anticipate any for next year. However, the district would like to find ways to compensate teachers whom they especially want to retain.

8. Glendale (Douglas County)

Information from Glendale indicates that there was talk of a merit pay plan several years ago but that nothing ever came from it. Currently, the district has no alternative to the single salary schedule.

9. Gold Beach Union High (Curry County)

Gold Beach did have a merit plan in 1970-71, but it was voted out by the faculty. There have been no subsequent discussions or plans in this area.

10. Harrisburg (Linn County)

The Harrisburg School District does not have a merit plan, only a column on the salary schedule that states a career teacher has an M.A. + 45. Nothing by way of merit pay or other alternatives is planned at this time.

11. Marcola (Lane County)

The Marcola School District has no alternative plans to the single salary schedule at this time. The school board has expressed an interest in considering some form of a merit pay system, but, to date, nothing has been done to implement such a program.

12. McMinnville (Yamhill County)

McMinnville did have a group of board members and teachers that studied the possibility of a merit plan. However, the group rejected the idea, and there are no further plans under consideration for next year.

13. Oakland (Douglas County)

The Oakland School District has no alternative pay plan other than the extra pay for extra duties. Two persons are on extended contract. No future plans are being considered for a merit pay program.

14. Pleasant Hill (Lane County)

The Pleasant Hill School District does not officially have a salary schedule, according to word from the superintendent's office. For the 1972-73 school year, teachers were granted a $370 across-the-board increase. However, placement of teachers new to the district apparently is based on a step identified from the 1971-72 salary schedule.

15. Port Orford-Langlois (Curry County)

Port Orford-Langlois has no merit or incentive program and no plans at this time of inaugurating such concepts.

16. Rainier (Columbia County)

Rainier has no merit or incentive plan. The board has been involved in discussing the concept, but nothing has been done beyond that stage.

17. Redland (Clackamas County)

The Redland School District had a merit pay plan through the 1971-72 school year. It has been dropped for the 1972-73 school year and nothing is being planned to replace it at the present time.

18. Reedville (Washington County)

In previous years there was talk of merit pay plans during consultation sessions between the teachers and the school board of Reedville.

Nothing was ever done, however, to carry it beyond the "talk stage."

19. Roseburg (Douglas County)

Information received from Roseburg indicates that they do not have any alternative plans to the single salary schedule.

20. Salem (Marion County)

Salem has no alternative pay plan at this time, beyond the standard policy of "extra pay for extra duties." The principal's salary schedule has moved down from 10 steps + time and responsibility to a 4-step level of experience schedule.

21. Sheridan (Yamhill County)

The Sheridan School District is on the single salary schedule with extended contracts for a librarian and a counselor. At the present time, they have no plans to change.

22. Sherman Union High (Sherman County)

The Sherman Union High School District is on a single salary schedule. Currently, they have no plans for alternative programs.

23. Silverton (Marion County)

The Silverton district is no longer on the double increment schedule. A Distinguished Teacher Award is the eighth and ninth step. The board reserves the right to approve or deny the increment.

24. Vernonia (Columbia County)

The Vernonia School District has no merit pay plan. The salary schedule is: B.A. + 15 + 30 + 45 + 60 + 75 + 90 + 105, M.A. + 15 + 30 + 45 + 60.

25. West Linn (Clackamas County)

West Linn has no merit plan, no extended contracts. Department heads get extra remuneration, and there are many teachers who are paid for extra-curricular activities. The district has no plans for considering any merit system.

This Bulletin has presented a survey report designed to inform Oregon administrators and school board members on the prevalence of alternative teacher pay plans which are currently operative or under consideration in Oregon, as well as merit or incentive plans which have been abandoned. Information is based on contracts with 47 Oregon school districts reported by the Oregon Education Association as using, or having considered using, such alternative or merit plans.

The survey emerged from an attempt to respond to some of the commonly posed questions as to feasibility and success of the plan; program planning and operation; teacher evaluation, eligibility, and receptivity. But above all, the report is intended to provide objective data on the extent to which a merit pay plan is being used in the state of Oregon. Of the 47 districts contacted, 11 districts had alternative pay plans or merit pay plans in operation; 11 districts were considering such plans; and 25 districts had no such plans in operation or under consideration.

Appendix 1

DISTRICTS SURVEYED

	District (A.D.M.)	Contact		District (A.D.M.)	Contact
1.	Amity (666)	Supt.	24.	Lincoln County (5,619)	Admin. Asst.
2.	Astoria (2,248)	Supt.	25.	Marcola (319)	Supt.
3.	Bandon (915)	Supt.'s Scty.	26.	McMinnville (3,131)	Supt.
4.	Bethel (3,419)	El. Curr. Dir.	27.	Medford (9,911)	Asst. Supt.
5.	Burns (657)	Supt.	28.	North Clackamas (14,349)	Asst. Supt.
6.	Colton (660)	Supt.	29.	Oakland (578)	Supt.
7.	Coos Bay (6,178)	Asst. Supt.	30.	Oregon City (5,078)	Asst. Supt.
8.	Corvallis (7,793)	Dir. Pers.	31.	Parkrose (5,552)	Asst. Supt.
9.	Crow-Applegate (527)	Supt.	32.	Pleasant Hill (1,373)	Supt.
10.	David Douglas (9,307)	Asst. Supt.	33.	Port Orford-Langlois (723)	Supt.
11.	Elkton (232)	Supt.	34.	Rainier (623)	Supt.
12.	Estacada UH (807)	Supt.	35.	Redland (435)	Supt.
13.	Forest Grove (3,330)	Clerk	36.	Redmond (2,641)	Supt.'s Scty.
14.	Gold Beach (539)	Supt.	37.	Reedville (627)	Supt.
15.	Glendale (565)	Supt.	38.	Reynolds (3,613)	Supt.
16.	Gresham Elem. (2,781)	Asst. Supt.	39.	Roseburg (6,903)	Asst. Supt.
17.	Gresham UH (4,495)	H. S. Prin.	40.	Salem (22,543)	Pers. Dir.
18.	Harrisburg (581)	Supt.	41.	Sheridan (790)	Supt.
19.	Hillsboro Elem. (2,584)	Supt.	42.	Sherman UH (198)	Supt.
20.	Josephine County (3,684)	Supt.	43.	Silverton (1,088)	Supt.
21.	Klamath Falls Elem. (2,418)	El. Curr. Cord. Teachers	44.	Springfield (9,821)	Admin. Asst.
22.	Klamath Falls UH (2,219)	Curr. Coord.	45.	Vernonia (714)	Clerk
23.	Lake Oswego (6,265)	Pers. Dir.	46.	Warrenton (638)	Supt.
			47.	West Linn (3,006)	Supt.

Appendix 2

1972-73 SALARY SCHEDULE
REDMOND SCHOOL DISTRICT

	LEVEL	STEP A	STEP B	STEP C	STEP D
185 days	1	$ 7,313	$ 7,525	$ 7,737	$ 7,949
	2	8,373	8,615	8,858	9,100
	3	9,433	9,706	9,979	10,253
	4	10,492	10,797	11,100	11,405
	5	11,552	11,887	12,222	12,557
205 days	6	13,925			
220 days	7	14,438	14,871	15,304	
	8	15,737	16,207	16,679	
	9	17,152	17,666	18,180	

Appendix 3

DIFFERENTIAL PAY PROPOSAL*
KLAMATH FALLS
(All data are approximate and intended as general information only)

BACKGROUND:

Year	Base: B.A.	Top: M.A.	INCREASE Top	INCREASE Base	% INCREASE Top	% INCREASE Base	Total Cost	% Increase	Average Increase Per Person
1962	4400	7275	275	200	3.9	4.7	111,851.00	9.6	$520.
1963	4600	7525	250	200	3.7	4.5	42,923.00	3.4	200.
1964	4700	7625	100	100	1.3	2.1	70,691.00	5.9	328.
1965	5000	8000	375	300	4.9	6.3	106,996.00	7.1	497.
1966	5200	8275	275	200	3.4	4.0	57,109.00	4.0	265.
1967	5800	9200	925	600	11.0	11.5	199,522.00	12.0	884.
1968	6200	10475	1275	400	13.8	6.9	204,601.00	11.0	850.
1969	6500	11150	675	300	6.4	4.8	157,400.00	7.8	666.
1970	6800	11800	650	300	5.8	4.6	173,108.00	8.0	590.
1971	7100	12250	450	300	3.8	4.4	124,250.00	5.4	511.
1972	7200	12350	100	100	.8	1.2	23,000.00	1.16	100.
11 yr.Average			$486	$272	4.3%	5.0%	122,034.00	6.85%	492

PROPOSED: (These are arbitrary figures used only to demonstrate the "sample" plan)

1973	5.5% increase - $525.00 across the board Joint study of differential pay plan as attached	115,362.00*	5.5	525
1974	5.5% increase - $553.00 average increase with an expected range from 300 - 1000	121,707.00*	5.5	553.
1975	5.5% increase - $583.00 average increase with an expected range from 300 - 1000	128,401.00*	5.5	583.
1976	5.5% increase - $615.00 average increase with an expected range from 300 - 1000	135,463.00*	5.5	615.
1977	5.5% increase - $649.00 average increase with an expected range from 300 - 1000	142,914.00*	5.5	649.

(*Includes $5,000 for 10 special incentive grants)
5 year averages (as proposed)

Average increase per person during last 12 years - $466.00 (last 11 years $492.00)
Average increase per person during last 5 years - 543.00
Average increase per person during last 3 years - 401.00
Average increase per person during next 5 years - 585.00 (Proposed)

Range of Increase:

1967 - 68	800 to 1150
1968 - 69	400 to 1200
1969 - 70	550 to 950
1970 - 71	350 to 875
1971 - 72	135 to 685
1972 - 73	100 to 100
AVERAGE	389 826
1972 - 74 (proposed)	$525.00
1975 - 76	300 to 1000

*The district subsequently approved a three-year pay plan based on this proposal.

Appendix 4

PROPOSED CRITERIA FOR DIFFERENTIATION
KLAMATH FALLS

1. Years of Service (in district): 1 point per year--1st 10 years; 1/2 point per year--next 10 years; over 25 years-- + 5 points
   = UP TO 20 POINTS
   (See assumption #3)* (See conditions #8 and #9)*

2. Professional Preparation: B.A. = 5 points; B.A. + 15 = 6 points; B.A. + 30 = 7 points; B.A. + 45 = 8; B.A. + 60 or 5th year = 9 points; M.A. = 10 points; M.A. + 15 = 11; M.A. + 30 = 12; M.A. + 45 = 13
   = UP TO 13 POINTS
   (See assumption #3)* (See conditions #8 and #9)*

3. Special Summer Workshops (NDEA, NSF, District-Sponsored, etc.)
   = UP TO 5 POINTS
   (See assumptions and conditions)*

4. Self Evaluation (Scale of 1-9): November, each year = UP TO 9 POINTS
   February, each year = UP TO 9 POINTS
   (See condition #7)*
   Scale to be designed by teachers and approved by Educational Council and School Boards

5. Peer Rating (Scale of 1-9): November, each year = UP TO 9 POINTS
   February, each year = UP TO 9 POINTS
   (Same as #4 above)

6. Extended Time (summer, after school, special, etc.):
   As per agreement with building principal
   1 point per full day equivalency
   = UP TO 6 POINTS

7. Extra Duty (clubs, committees, ball games, dances, etc. not otherwise reimbursed)
   = UP TO 6 POINTS

8. Teacher Evaluation (Designed by teachers specifically for differential rating purposes--approved by Board)
   Below Average to Average: 1 - 7 points
   Average to Above Average: 8 - 14 points
   Above Average to Superior: 15 - 21 points
   = UP TO 21 POINTS

TOTAL POSSIBLE POINTS FOR THE YEAR = UP TO 107 POINTS

---

*As listed in the committee's report, Feasibility of Merit Pay, August, 1972.

Appendix 5

PROPOSED TRANSITION PLAN
KLAMATH FALLS

I. Description of Categories:

A. Regular Classroom Teacher I - Adequate performance and classroom responsibility only.

B. Regular Classroom Teacher II - Above average performance and classroom responsibility plus broader responsibility in the building.

C. Regular Classroom Teacher III - IV - Outstanding performance - building and district responsibilities (including extended time).

.....of Total Staff.....

I - 30%
II - 40%
III - 20%
IV - 10%

II. Procedure: (5-year plan)

A. Place all teachers on this outline.

1. Category to be determined by a committee of teachers and administrators.

2. During the 5-year period, a teacher would advance within the category on the basis of performance from $100 to $1000 each year. The average would be about 5.5% per year.

3. After the initial placement, category changes can be only on recommendation of committee (Educational Council) after petitioned by teacher. If a person reaches the bottom of his category, he remains there until he changes categories. The principal can recommend column changes, but the committee must recommend changes, etc., etc.

III. Category Changes:

Teacher and/or immediate supervisor would petition the committee in writing in January each year. The committee would consider the information (including time in service, course work, performance, evaluation comments by others, etc.) and vote by secret ballot IF THERE WAS ROOM IN THE CATEGORY, etc.....

A person could not receive more than a $1000 dollar raise even if he changes categories, and he could receive a $1000 dollar raise without changing categories up until he reaches the top of the category.....

IV. Column Changes:

A. Principal recommends column changes. The amount of increase awarded would be based on some established criteria.